



QuickStart Guide

System Setup & Customization

Big Contacts, LLC

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This guide will show you how to get off to a quick and successful start with BigContacts.

Table of Contents

Section I: **Getting Started**

Add Users	Pg. 3
User Roles/ Permissions Settings.....	Pg. 4
Team Assignment & Access.....	Pg. 5
Customize your Account	Pg. 6
Importing Contacts	Pg. 7
Exporting your contacts to a Spreadsheet.....	Pg. 7
Preparing your Spreadsheet for Import.....	Pg. 7
Upload Your Contact File (spreadsheet).....	Pg. 9
Deleting an Import.....	Pg. 10
Setup your Email	Pg. 11
Create your Email Signature.....	Pg. 11
Adding an image to your email signature.....	Pg. 12
Setup your Email dropbox.....	Pg. 13

Section II: **Manage Modules**

Task Module	Pg. 15
Sales Module	Pg. 16
Marketing Module	Pg. 17

Section III: **Manage Templates**

Email Templates	Pg. 18
Letter Templates	Pg. 19
Web forms	Pg. 20

Section IV: **Support Resources**

Knowledgebase Library	Pg. 23
Email Support	Pg. 23
Live Chat	Pg. 23

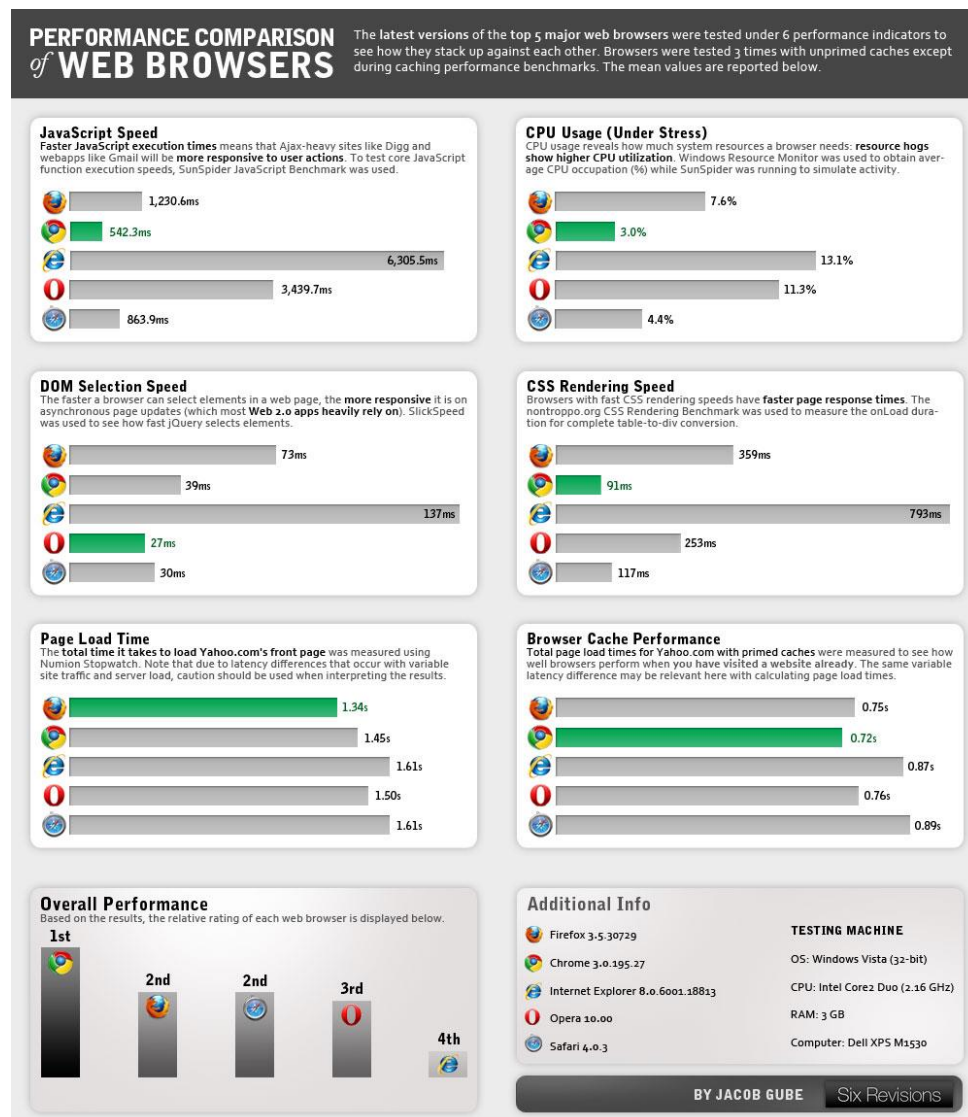
Section I: Getting Started

Thank you for choosing BigContacts. It is our mission to ensure that you get the most out of this very easy-to-use, yet highly capable platform. Included in this QuickStart guide you will find information on key tips and techniques that will help you quickly adopt and integrate this CRM/Contact Management Software within your business.

System Tip: BigContacts supports a total of 4 web browsers. (Firefox, Safari, Google Chrome, Internet Explorer) It is commonly found that the one of the best performing and most stable web browser for BigContacts, as well as many other web applications, is Firefox.

For best performance we suggest downloading this free web browser today.

<http://www.mozilla.org/en-US/firefox/fx/#desktop>



Below are **4 steps** that you will want to complete prior to using the system as this will greatly increase your productivity and success from the start.

1. Add Users

Adding people to your system can greatly increase efficiency. Once they are added, you can assign tasks to them, view them on your group calendar, see opportunities they are working on, and begin to see the activity they are generating on the system such as how many calls they are logging, how many new contacts they have entered, and much more.

- First select the “**Admin**” tab in left hand navigation menu
- In the admin tab you will see a menu of options at the top of the screen
- Find the section labeled “**Manage Users**” and select the “**Add / Edit Users**” link
- Above the user table you will select the orange button labeled as “**Add New User**”

WATCH THE VIDEO: <http://youtu.be/p2cxsAesag8>

The screenshot shows the BIGContacts Admin interface. On the left is a navigation menu with 'Admin' highlighted. The main content area has two tabs: 'Manage My Account' and 'Manage Users'. The 'Manage Users' tab is active, showing an 'Add / Edit Users' button. Below this is an 'Add New User' button. A text box explains that adding people increases efficiency. Below the text is a table of users.

Edit	First Name	Last Name	Color	Email Dropbox
	Bob	Hammond		bob@bigcontacts.net
	Emilio	Primucci		emilio@bigcontacts.net
	Fernando	Khoury		Request dropbox
	John Inactive	Smith		Request dropbox

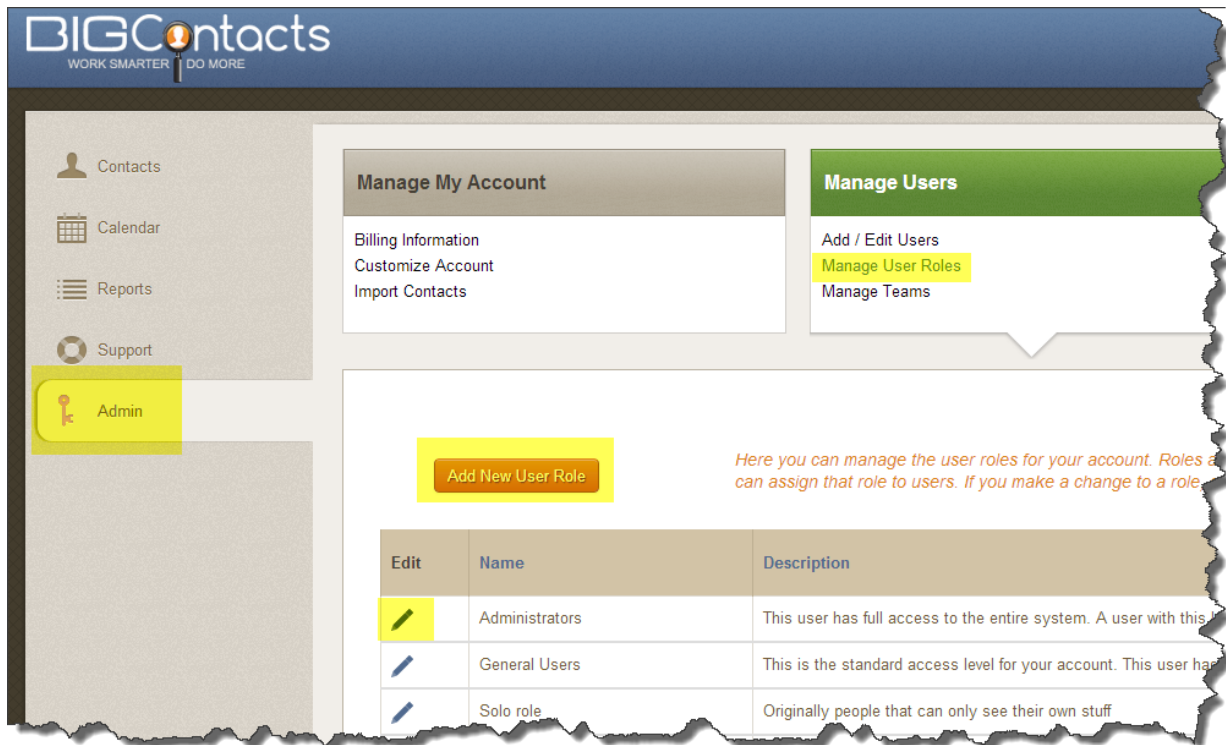
User Roles/ Permissions Settings

After you have added all of your users, you may want to restrict their access to certain contacts and functions within your account.




BigContacts allows you to create any number of user roles and then assign to various levels of permission and access to your account. This is all designed to help you better manage and control access to certain contact information and reports within your Contact Management Software.

- First select the “**Admin**” tab in left hand navigation menu
- In the admin tab you will see a menu of options at the top of the screen
- Find the section labeled “**Manage Users**” and select the “**Manage User Roles**” link
- In here you can either edit an existing user role or create a new one by selecting the orange button labeled for “**Add New User Role**”

WATCH THE VIDEO: <http://youtu.be/gdPO8isYpZk>



The screenshot shows the BIGContacts Admin interface. On the left is a navigation menu with options: Contacts, Calendar, Reports, Support, and Admin (highlighted). The main content area is titled 'Manage My Account' and includes links for Billing Information, Customize Account, and Import Contacts. To the right, under the 'Manage Users' heading, there are links for Add / Edit Users, Manage User Roles (highlighted), and Manage Teams. Below this, there is an orange button labeled 'Add New User Role'. A text box explains: 'Here you can manage the user roles for your account. Roles can assign that role to users. If you make a change to a role...'. At the bottom, there is a table with three columns: Edit, Name, and Description.

Edit	Name	Description
	Administrators	This user has full access to the entire system. A user with this
	General Users	This is the standard access level for your account. This user has
	Solo role	Originally people that can only see their own stuff

Team Assignment & Access

Teams allow you to create groups for your users. You can restrict access of contacts and meetings to team members by editing a user's role above.

You can create Teams for your account as follows:

1. Select the "**Admin**" tab in the left navigation menu
2. Locate the "**Manage Users**" section in admin screen (second block from the left)
3. Click on the "**Manage Teams**" link in this section
4. You will see an orange button labeled "**Add New Team**". Select this and begin creating your new team.

WATCH THE VIDEO: <http://youtu.be/mm0Uc2EZRes>

The screenshot shows the BIGContacts Admin interface. The top navigation bar includes the logo, a search bar, and buttons for 'Add Contact', 'Contact List', 'Task List', and a settings gear. The left sidebar has icons for 'Contacts', 'Calendar', 'Reports', 'Support', and 'Admin' (which is highlighted in yellow). The main content area is divided into four sections: 'Manage My Account', 'Manage Users' (highlighted in green), 'Manage Modules', and 'Manage Templates'. Under 'Manage Users', the 'Manage Teams' link is highlighted in yellow. Below this, there is an orange 'Add New Team' button and a text box explaining that teams allow users to create groups and restrict access to certain parts of the system. At the bottom, there is a table listing existing teams.

Edit	Name	Delete
	Team RED	
	Team BLUE	
	Assistants	
	BN-653 team	

2. Customize your account

There are a number of ways that you can customize your BigContacts account. This article will show you how and where you can customize some of the core elements of your account.

1. Go to the "**Admin**" tab and locate the "**Manage My Account**" section
2. In here you will select the "**Customize Account**" link
3. In this section you can customize a variety of fields including; regional settings, calendar settings, custom fields, contact types, and required fields

WATCH THE VIDEO: <http://youtu.be/Rhrkw-0Qv0I>

The screenshot displays the BigContacts web application interface. At the top, the BigContacts logo and tagline 'WORK SMARTER | DO MORE' are visible. Below the logo is a search bar and navigation links: '+ Add Contact', 'Contact List', 'Task List', and a settings gear icon. A left sidebar contains icons for 'Contacts', 'Calendar', 'Reports', 'Support', and 'Admin' (which is highlighted in yellow). The main content area is titled 'Manage My Account' and includes sub-sections: 'Manage My Account' (with links for Billing Information, **Customize Account**, and Import Contacts), 'Manage Users' (Add / Edit Users, Manage User Roles, Manage Teams), 'Manage Modules' (Task Module, Sales Module, Marketing Module), and 'Manage Templates' (Email Templates, Letter Templates, Webforms). The 'Customize Account' section is expanded, showing tabs for 'Regional Settings', 'Calendar Settings', 'Contact Types', 'Contact Activities', 'Custom Fields', and 'Required Fields'. The 'Regional Settings' tab is active, displaying dropdown menus for 'Timezone' (set to GMT-05:00 Eastern Time (US & ...)), 'Time format' (set to 3:00pm), 'Date format' (set to mm/dd/yyyy), 'Currency symbol' (set to \$ Dollar), and 'Telephone Format' (set to (123) 456-7890 [US/Canada]). A 'Save Changes' button is located at the bottom right of the settings panel.

3. Import Contacts

It is very easy to import contacts into your BigContacts account. We offer a free import tool that will allow you to take any properly formatted spreadsheet and import your contacts...including custom fields.

This article will show you how to use our “**Import Wizard**” to import your contacts.

Step 1: Prepare Your Import

Exporting your contacts to a Spreadsheet

WATCH THE VIDEO: <http://youtu.be/L2eVrdAwMaA>

1. You will first need to export your current contact list to an excel spreadsheet
2. Save the spreadsheet in a .CSV file format
3. From the main import screen you will see a menu of icons that represent the most common programs that we see contacts being imported from. You will want to locate the icon for the program/ source of your contact list and click on the text directly below that icon.
4. In the window that opens you will see a set of instructions that will walk you through the steps of how to export your contacts from that particular program.
5. Now that your contacts are exported to a spreadsheet, it is time to make the necessary adjustments and additions to the column headers.

Preparing your Spreadsheet for Import

WATCH THE VIDEO: http://youtu.be/PBC2FY_zX60

1. You are now ready to review the header names in each column of your spreadsheet to ensure the accurate mapping of the data into your BigContacts account.
2. To view a list of all the correct "labels" for each field in your BigContacts account, you will want to go to the main Import screen and click on link that reads "**CLICK HERE**" to show a complete list of header names.
3. Compare this list to the columns headers you have and make changes as necessary. If you miss a field, not to worry! Our system has a "mapping" step that will allow you to choose where to map certain fields that may not have auto mapped in this process.
4. Now that you have all your headers correctly labeled, there are a few columns to consider adding to your spreadsheet before you save this file and prepare to upload your contacts. The columns you will want to consider adding and the steps for doing this are shown below.

Assign each contact to a user on your team

First, obtain the “**User ID#**” for each team member

1. Go to the “**Admin**” tab
2. In the “**Manage Users**” section you will select the “**Add/Edit Users**” link
3. In the User table you will see a column labeled “**User ID**”.
4. In your spreadsheet, create a column labeled “**Assigned to**” and paste the appropriate **User ID** next to each contact. This will ensure each contact is assigned to the appropriate person on import
5. In your spreadsheet add a new column labeled "Assigned To" and enter the appropriate User ID next to each contact record.

Add Custom fields to your spreadsheet as needed

There may be fields that you wish to import where BigContacts does not already offer as a standard field. In this case you will want to create a custom field **PRIOR** to importing your contacts. The key thing here is that you are creating a home for this custom field to reside, so it must first be created so that the Import Wizard has a place to map this field to.

PLEASE NOTE: Currently you can only import free-form text “**Custom Fields**” and “**Contact Types**”.

FUTURE ENHANCEMENTS: We will soon be adding the capability for you to import “**Tags**” as well as “**Contact Groups**” which are custom picklists that you can create within your BigContacts account.

Below are the steps for creating your “**Custom Fields**” and “**Contact Types**” in your BigContacts account.

1. Go to the “**Admin**” tab
2. In the “**Manage Account**” section you will select the “**Customize Account**” link
3. In here you will see a variety of tabs that include fields that you can customize, including “**Contact Types**”, and “**Custom Fields**”

Step 2: Upload Your Contact File (spreadsheet)

Now that your spreadsheet has been updated and saved, you are ready to upload your contacts and finish the import.

Importing your contacts

WATCH THE VIDEO: <http://youtu.be/mjxtliZBCfw>

The screenshot shows the BIGContacts Admin interface. The sidebar on the left has the 'Admin' tab selected. The top navigation bar includes 'Manage My Account', 'Manage Users', and 'Manage Modules'. Under 'Manage My Account', the 'Import Contacts' link is highlighted. The main content area is titled 'Prepare Your Import' and contains the following text:

The Import Wizard is a FREE tool that will assist you with importing all your "core" contact data into your BigContacts account (Name, address, phone number). Below you can select the program or file type that represents where you currently have your contacts stored. From here you can follow the step by step instructions.

PLEASE NOTE: To ensure best results, we strongly encourage you to review this [Video & Article](#) before attempting to import your contacts. In here you will find helpful tips on organizing your contact information in a way that will ensure that you get off to a fast start with the system.

Prepare Your Import

Before getting started, [CLICK HERE](#) to view the best practice for importing your contacts

Step 1: Select the program that you are importing your contacts from:

The interface displays icons for the following programs and file types:

- Microsoft Excel (.xls)
- CSV File (.csv)
- tab-Delimited File (.txt)
- VCard File
- Microsoft Outlook
- Microsoft Outlook Express
- Mozilla Thunderbird
- Apple Address Book
- Palm Desktop

At the bottom, there are logos for various email providers: Yahoo! Mail, Windows Live Mail, Gmail, GoldMine, and ACT!.

On the right side, there is a section titled 'Step 2: Upload Your Contact File'. It contains the following text:

We support importing CSV files from Outlook and other apps. We also support importing VCard files. For detailed instructions on how to use the wizard, click on the icon for your program in the menu to the left of this section.

In order for your imported data to end up in the correct column in your Spreadsheet your "header" row. In the "Header" row, you must enter a column name to tell the system where to map the data. For a complete list of field names that you can use, click on the link below.

[CLICK HERE to show a complete list of field names](#)

Please select a CSV, tab-delimited or VCard file.

At the bottom right, there is a 'File' input field with a 'Browse...' button.

1. Go to the "Admin" tab and locate the "Manage My Account" section
2. Select the "Import Contacts" link
3. Under "Step 2", click on the "Browse" button, select the file you'd like to import, then click the button labeled "Continue to Next Step"
4. You are now on the "Mapping Screen" and in here you will want to scan all of the header names to ensure they are set to map to the correct destination (field) in your BigContacts account.
5. When you are certain that all mapping is in good order, you will scroll to the bottom of the screen and click on the button labeled "Continue to Next Step" found in the bottom right hand corner of this screen.

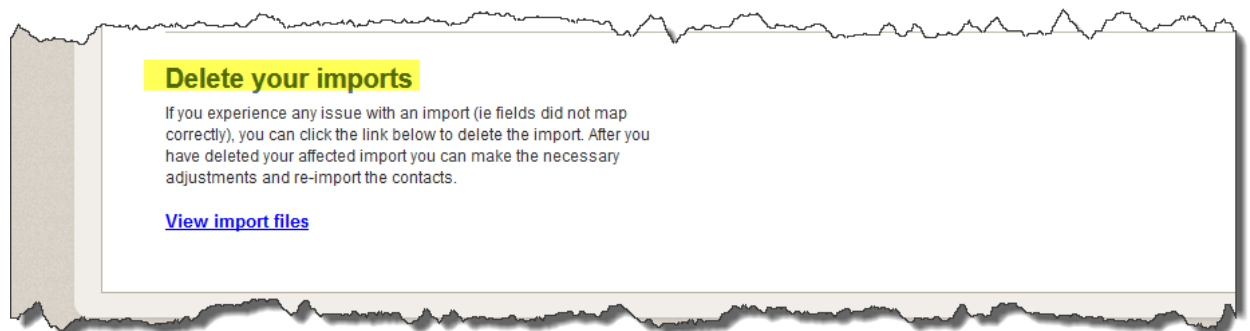
6. You are now at the final step for completion of your Import. This screen is what we call the "Preview Screen". This screen allows you to preview how a contact will look if you were to complete the import process. This is a great way to ensure that every bit of data is mapping to the field you thought it would. Your contacts are NOT imported at this stage.
7. Your contacts are not yet imported yet at this point, however if you **DO** like what you see, click on the "**Finish**" button in the lower right hand corner of the screen to complete your import.
8. If you **DO NOT** like what you see, you can click on the button labeled "**Back to Mapping Fields**" in the lower left hand corner of the screen to go back to the mapping screen and make the necessary adjustments.

Deleting an Import

If at any point you discover that you did not map certain fields the way you wanted them or maybe you forgot to add a custom field prior to import. Not to worry, we offer a very easy way for you to "Delete" your import. Below are the steps for this simple process.

CAUTION!! - You MUST be very careful with this helpful yet very powerful feature. First, choose VERY carefully the import you are deleting to ensure you are removing the contacts that you really want to remove. Second, when you delete any set of contacts the contact records and ALL data/history associated with those records will be PERMANENTLY removed from your database.

WATCH THE VIDEO: <http://youtu.be/FxCP65C7vVw>



1. Go to the "**Admin**" tab and locate the "**Manage My Account**" section
2. In here you will select the "**Import Contacts**" link
3. Scroll down a little and you will see the section labeled "**Delete your imports**" in the lower left hand corner of this screen

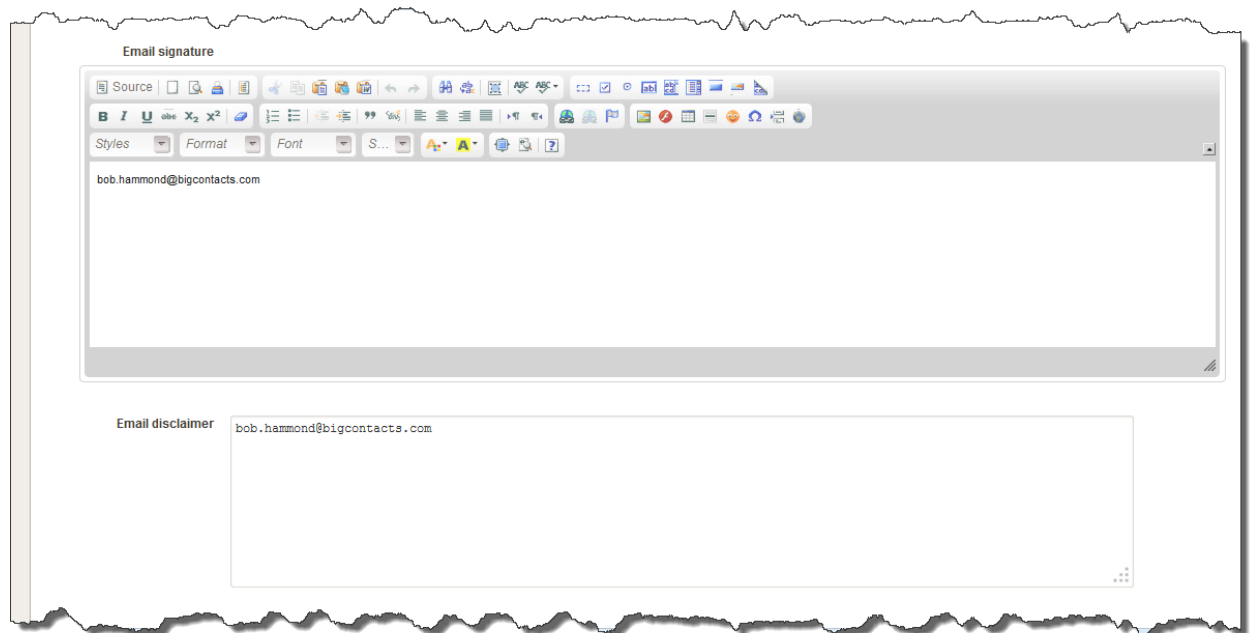
4. Click the link labeled "View Import Files. IN here you will see a table of all imports that have been made to your account over time. Again, **PLEASE** be very careful here to ensure that you are in fact removing the correct file from your database.


4. Setup your Email

Create your Email Signature

BigContacts allows you to create an email signature that will automatically be added to any email you send directly from inside the system by clicking on a contact's email address.


WATCH THE VIDEO: <http://youtu.be/WT8F48zpgWc>



1. Click on the "**Admin**" tab
2. To the left of your name your name, click on the **pencil icon**  **to edit your user information.** Scroll down toward the bottom of the screen you will see two sections for customizing your email signature
 - The first section you will see is for your actual signature
 - The second section can be used for any disclaimers that you may place in your emails. Any text in the disclaimer box will display underneath your email signature.

Adding an image to your email signature

With the BigContacts Email editor you can add an image to your email signature. You will be adding a hosted (online) image versus a raw image file such as a .jpg, .gif, or .png

1. When you are in the Email signature screen look for the **"picture icon"** . This is located to the right of the "flag" icon and to the left of the "flash" icon (red circle with an "f" in the middle)
2. When you click the **picture icon** you will see a space to insert a URL. This is where you can paste an "Image Location". **NOTE:** To ensure that your image can be viewed by most email programs you will not want to have any spaces in the file name/URL.


Depending on the browser you are using there are different methods for getting the URL for the image you wish to use:

- **Mozilla Firefox** - Go to an image on a website and right-click on the image, then select "Copy Image Location".
- **Safari or Opera** - Right-click on the image, then select "Copy Image Address"
- **Internet Explorer** - Right-click on the image, then select "properties" and this will open a window where you will copy and paste the "Address URL"

Once you have the Image Location on your clipboard you can paste it into the "URL" field back in the BigContacts Email screen.

1. You can change the Width and Height of the image by changing the number in the "width" and "height" fields
2. You can remove an image border by placing a value of "0" (zero) into the "Border" field
3. When you are finished, click on the green "OK" button

Have some HTML you want to paste into your Email or Email Signature?

Look for the **"Source" Button**  **Source** in the upper left corner of your Email Editor options (to the left of the scissors icon). Clicking on this will convert you to HTML mode so you can paste in your HTML.

Setup your Email dropbox

BigContacts offers a powerful tool known as an email “dropbox” that allows you to automatically capture incoming emails and store them to the appropriate contact records. No matter what email service provider you are using, the setup is essentially the same.

WATCH THE VIDEO: <http://youtu.be/JOpjomk0p7Y>

The screenshot shows the BigContacts Admin interface. On the left is a sidebar with navigation links: Contacts, Calendar, Reports, Support, and Admin (highlighted in yellow). The main content area has three tabs: 'Manage My Account', 'Manage Users' (selected), and 'Manage Modules'. Under 'Manage Users', there are links for 'Add / Edit Users' (highlighted), 'Manage User Roles', and 'Manage Teams'. Below these is a message about adding users and a 'Free Trial Accounts' note. An 'Add New User' button is present. A table lists users with columns: Edit, First Name, Last Name, Color, Email Dropbox, and Verified. The 'Email Dropbox' column is highlighted, and the 'Request dropbox' link is visible for several users.

Edit	First Name	Last Name	Color	Email Dropbox	Verified
	Bob	Hammond		bob@bigcontacts.net	Yes
	Emilio	Primucci		emilio@bigcontacts.net	Yes
	Fernando	Khoury		Request dropbox	Yes
	John Inactive	Smith		Request dropbox	Yes
	Amelia	Earhart		Request dropbox	Yes
	Restricted	User		Request dropbox	Yes
	Secretary	Jones		Request dropbox	Yes

If you have do NOT already have a BigContacts Email Dropbox address

1. Click on the "Admin" Tab in your system
2. Under the "Manage Users" section you will select the "add/edit users" link
3. In here you will see a row with your name and a link labeled "request an email dropbox"
4. When you click this link, it will create an email dropbox address for you

Setting up your email dropbox

1. Login to your email account through your email service provider (Gmail, Webmail, Yahoo, etc)
 2. Find the "**settings**" section of your email account
 3. In here, you will locate the "**incoming email**" section
 4. Locate the settings that allow you to "**forward a copy**" of all incoming emails to another address
 5. In here you will enter (*copy & paste*) your BigContacts email dropbox address
 6. Save your changes and you are now set to capture, sort and store incoming emails to your BigContacts contact database
-

Special Notes:

RackSpace/ Road Runner Customers - If RackSpace or Road Runner is your Email provider you will want to follow the following directions to set up your dropbox.

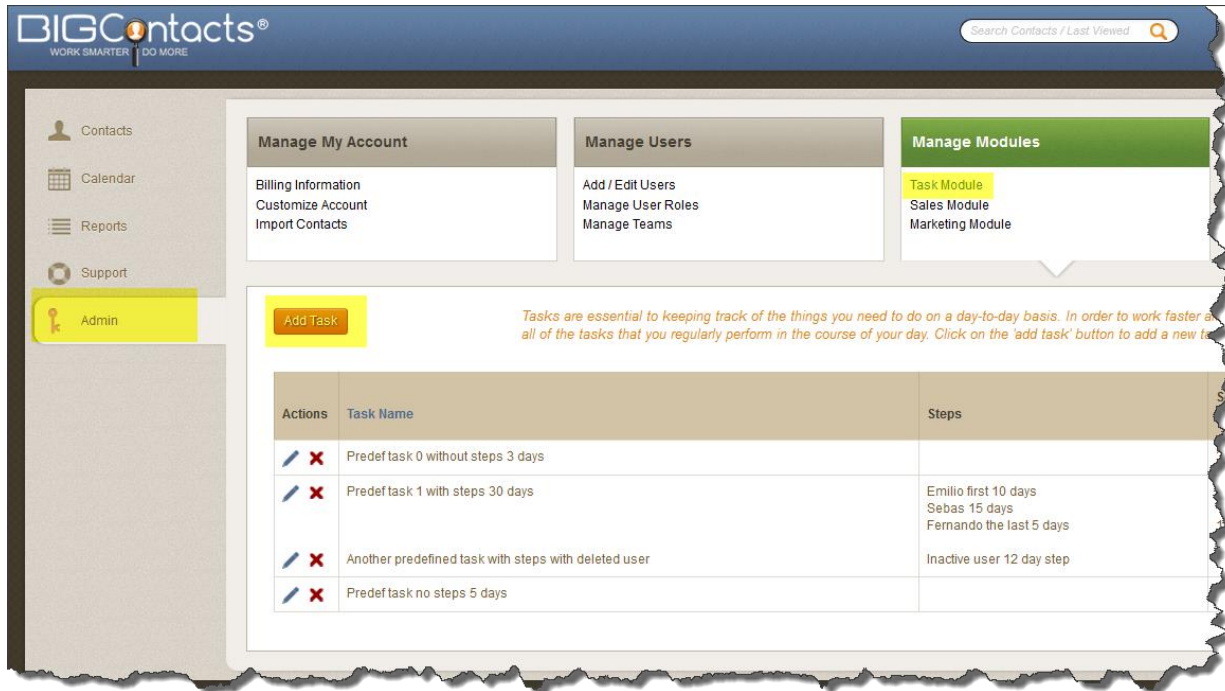
- [Set up a generic gmail account](#). (This is typically the easiest email service to use in this situation. This could be something as simple as "yourlastname.dropbox@gmail.com")
- Go into the settings of the new generic Gmail account and paste your BigContacts dropbox email address into the section that will "forward a **copy** of incoming emails" (This should look something like this "johnd1234@bigcontactsemail.com")
- Go into your RackSpace settings and paste your generic Gmail address into the section that will "forward a **copy** of incoming emails"
- When you are sending emails OUTSIDE the BigContacts system you can simply BCC your generic Gmail address to get a copy of the email stored into the appropriate Contact Record.

Section II: Manage Modules

Task Module

Tasks are essential to keeping track of the things you need to do on a day-to-day basis. In order to work faster and more effectively, we encourage you to pre-load all of the tasks that you regularly perform in the course of your day.

WATCH THE VIDEO: http://youtu.be/ASGg-SjW_VI



You can add Tasks to your account as follows:

1. Select the "**Admin**" tab in the left navigation menu
2. Locate the "**Manage Modules**" section in admin screen (second block from the right)
3. Click on the "**Task Module**" link in this section
4. You will see an orange button labeled "**Add Task**". Select this and create your new Task.

SPECIAL NOTE: We realize that many tasks often times involve multiple steps. We call a multi-step task a "workflow" BigContacts allows you to create a workflow with as many steps as you need.

Sales Module

The Sales Module is a must for any company that is looking to better track your current opportunities. This module allows you to customize a sales pipeline, and your own products along with the prices and commissions and also to create commission splits between your team members.

WATCH THE VIDEO: <http://youtu.be/5nnQsuk-A1A>

The screenshot shows the BIGContacts Admin interface. On the left is a navigation menu with 'Admin' highlighted. The main content area has three tabs: 'Sales Pipeline' (active), 'Product', and 'Commission Splits'. Below the 'Sales Pipeline' tab, there is a button 'Add new sales stage' and a text box for creating a custom pipeline. Below this is a table showing the current sales pipeline stages.

Edit	Stage	Confidence (%)	Sales Cycle (minimum days to close)
	Lead	20.00	60
	First Meeting	40.00	30
	Proposal	60.00	20
	Closed/Pending	95.00	5
	Closed/Won	100.00	0

You can customize the Sales Module in your account as follows:

1. Select the "**Admin**" tab in the left navigation menu
2. Locate the "**Manage Modules**" section in admin screen (second block from the right)
3. Click on the "**Sales Module**" link in this section
4. You will see three tabs labeled "sales pipeline", "product", "commission splits". We suggest that you work your way from left to right when customizing your sales module.

Marketing Module

The Marketing Module will eventually house a variety of marketing services. Today we have an email drip marketing feature that we call "AutoPilot".

AutoPilot is like having an assistant taking care of your clients and prospects for you. AutoPilot actions are triggered off of two things. The first is the Sales Pipeline Stage and the second is the number of days the contact or opportunity has been in that stage. With BigContacts, you can create many different sales stages as you want to reflect the type of business you have. Once you have your sales stages defined, you can then build campaigns for any or all of your sales stages.

WATCH THE VIDEO: <http://youtu.be/ZqY9RqTxX4s>

The screenshot shows the BigContacts Admin interface. On the left is a navigation menu with links for Contacts, Calendar, Reports, Support, and Admin (highlighted). The main content area is divided into three sections: 'Manage My Account' (Billing Information, Customize Account, Import Contacts), 'Manage Users' (Add / Edit Users, Manage User Roles, Manage Teams), and 'Manage Modules' (Task Module, Sales Module, Marketing Module - highlighted). Below these is the 'AutoPilot (Email Drip Marketing)' section. It contains a description of the feature, a list of notes, and a table for 'AutoPilot Actions'.

AutoPilot (Email Drip Marketing)

"AutoPilot" allows you to automate emails & tasks in your business

AutoPilot is like having an assistant taking care of your clients and prospects for you. AutoPilot actions are triggered off of two things. The first is the Sales Pipeline Stage and the second is the number of days the contact or opportunity has been in that stage. With BigContacts, you can create many different sales stages as you want to reflect the type of business you have. once you have your sales stages defined, you can then build campaigns for any or all of your sales stages.

AutoPilot will then automatically begin sending emails and assigning tasks at exactly the right times based on what you set up in your system. Once a day, at 7:30pm ET, the system kicks in and sends out email sor assigns tasks according to your specific instructions. The details of the emails and tasks that are sent out by the system are recorded in the contact's history.

Notes:

- Autopilot actions occur automatically once an opportunity reaches a specific number of days in a given stage.
- The "Assigned User" is the person on your team who is assigned to the contact / prospect.
- The user's email signature and disclaimer is appended to the end of any emails.

AutoPilot Actions

Edit	Stage	# of Days in Stage	Action	Person Task Assigned to or Email is From	Email Subject or Task Description	Testing	Delete
Add New AutoPilot Action							

You can customize the Marketing Module in your account as follows:

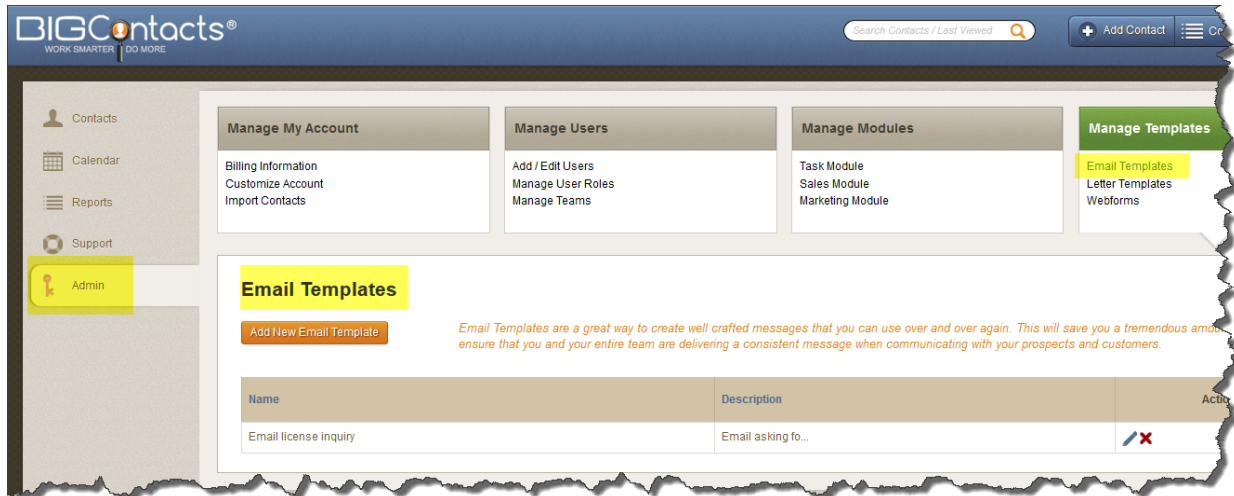
1. Select the "**Admin**" tab in the left navigation menu
2. Locate the "**Manage Modules**" section in admin screen (second block from the right)
3. Click on the "**Marketing Module**" link in this section
4. You will see an orange button labeled "**Add New Autopilot Action**". You will select this to begin creating emails and adding tasks for your drip marketing campaigns.

Section III: Manage Templates

Email Templates

Email Templates are a great way to create well-crafted messages that you can use over and over again. This will save you a tremendous amount of time and will ensure that you and your entire team are delivering a consistent message when communicating with your prospects and customers.

WATCH THE VIDEO: <http://youtu.be/1Fz5yJ-XhqE>



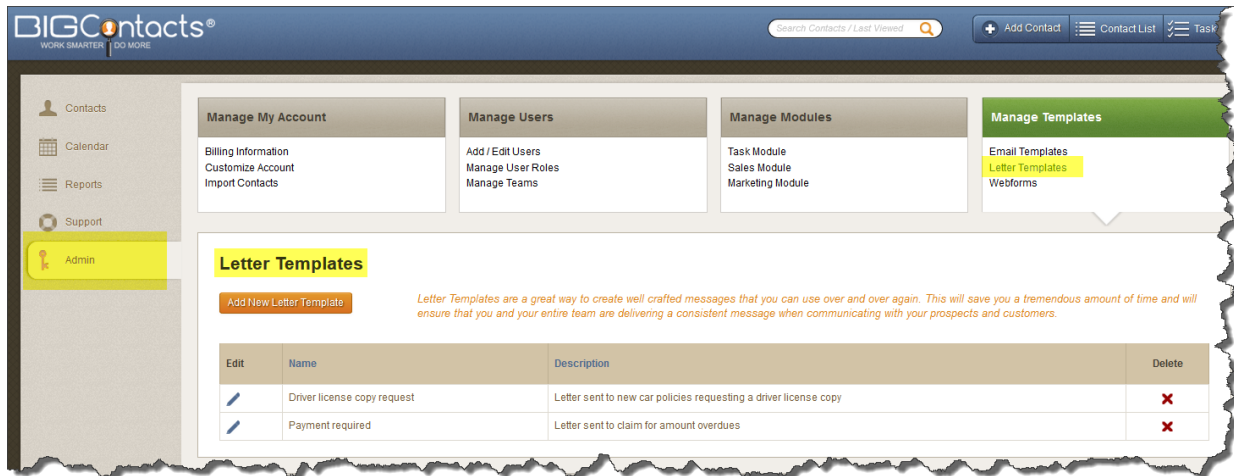
Create custom Email Templates in your account as follows:

1. Select the "**Admin**" tab in the left navigation menu
2. Locate the "**Manage Templates**" section in admin screen (second block from the right)
3. Click on the "**Email Templates**" link in this section
4. You will see an orange button labeled "**Add New New Email Template**". You will select this to begin creating your template.

Letter Templates

Letter Templates are a great way to create well-crafted messages that you can use over and over again. This will save you a tremendous amount of time and will ensure that you and your entire team are delivering a consistent message when communicating with your prospects and customers.

WATCH THE VIDEO: http://youtu.be/oXWayRA_vyg



Create custom Letter Templates in your account as follows:

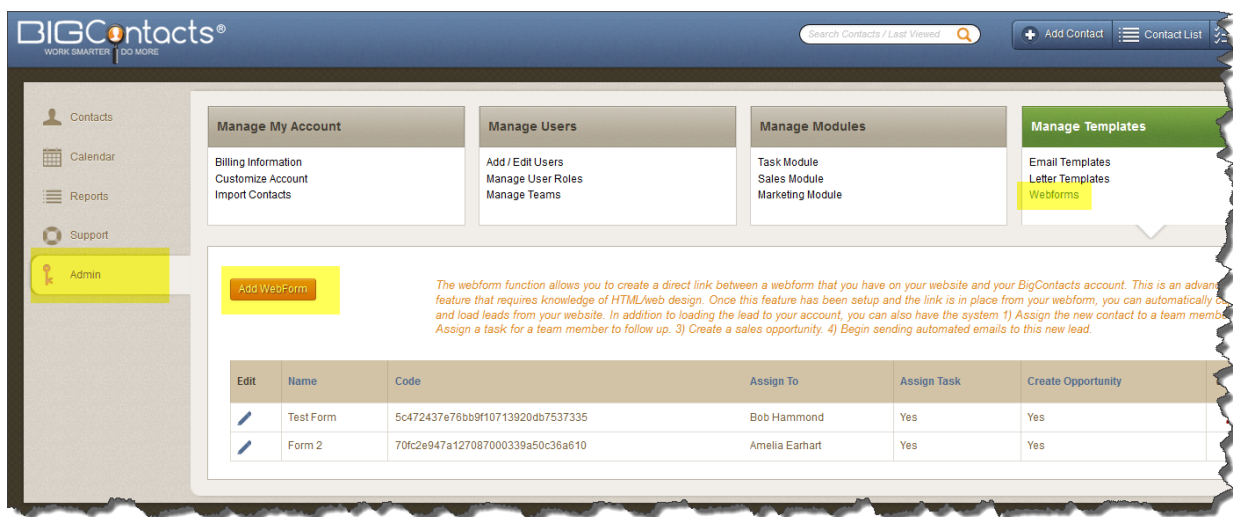
1. Select the "**Admin**" tab in the left navigation menu
2. Locate the "**Manage Templates**" section in admin screen (second block from the right)
3. Click on the "**Letter Templates**" link in this section
4. You will see an orange button labeled "**Add New New Letter Template**". You will select this to begin creating your template.

Web forms

BigContacts has a Webform feature that allows you to connect a web form from your website to the BigContacts system so that when a contact completes and submits the form on your website, it instantly creates a new contact record in your BigContacts system.

As you will see from the video, setting up a web form is easy, however in order to connect the web form to your website you will need to **have your Web person physically take the unique form code (and merge fields) and enter them into the HTML of your website.**

WATCH THE VIDEO: <http://youtu.be/cNPp4HaLc>



Setting up a new web form:

- Click on the Admin Tab and in the **"Manage Templates"** section, click on the **"Webforms"** link
- Click on the orange **"Add Web Form"** button
 1. In the "Name" field, enter the name of your webform. Example webform name: Free Trial Form
 2. In the "Assigned to" field, use the drop down menu to select the person on your team whom you would like the contact to be assigned to when the contact is created
 3. Check the "Assign Task" box. Although this is an optional selection, it is usually a good idea for a task to be created with any new web form submission.
 4. In the "Task name" field, enter the subject line of the task you would like to see when a contact submits this webform. As you are working through your task list you will see these tasks. Example Task subject line: New Web Lead
 5. Use the dropdown menu labeled "Assign task to" to select which member of your team you would like this task to be assigned to

6. Check the "Create Opportunity" box if you want a sales opportunity to be automatically created for you. In other words, check this box if you want to add contacts that submit this webform to your pipeline or process.
7. If you checked the "Create Opportunity" box, use the dropdown menu labeled "Opportunity stage" to select what stage you would like the opportunity to be in when this contact is created.
8. If you checked the "Create Opportunity" box, also use the dropdown menu labeled "Opportunity product" to select what main product you would like the opportunity to have when this contact is created.
9. When finished reviewing the web form settings, click on the orange "Add WebForm" button to save your changes and create your unique form code!
10. Finally, take note of the unique form code and the merge fields (See Image Below for where to find merge values) and give this to your web person, or if you are the web person, use these to connect the web form to your website by adding them to the appropriate places in your HTML.

Example of a webform

[CLICK HERE](#) to view a sample webform. In here you can you can "right click" on any white space on page to then select "View page source". In here you can review the HTML code for this sample webform to ensure that format of your code matches the one you have in your BC account.

Standard Data Fields and their merge values

Please Note: When using these merge values you must put double brackets on each side. **Example:** {{first_name}}

first_name	abcd	family_first_name
middle_name	assigned_to	family_middle_name
last_name	comments	family_last_name
email	website	family_salutation
home_address1	timezone	family_gender
home_address2	is_private	family_formal_name
home_address3	email_opt_out	family_date_of_birth
home_city	gender	family_relation
home_state	marital_status	family_phone
home_zip	date_of_birth	family_email
home_country	ssn	family_fax
home_phone	dl_number	family_country
mobile_phone	dl_issuing_state	family_dl_number
home_fax	dl_issue_date	family_interests
contact_type	dl_expiration_date	
salutation	lead_type	spouse_phone
formal_name	interest	spouse_office_company
nickname	office_businessname	spouse_office_title
lead_source	office_office_address1	spouse_office_street1
	office_office_address2	spouse_office_street2

office_office_address3	spouse_middle_name	spouse_website
office_office_city	spouse_last_name	spouse_email_opt_out
office_office_state	spouse_email	spouse_gender
office_office_zip	spouse_office_email	spouse_date_of_birth
office_office_country	spouse_office_street3	spouse_dl_number
office_email	spouse_office_city	spouse_dl_issuing_state
office_office_phone	spouse_office_state	spouse_dl_issue_date
office_mobile_phone	spouse_office_zipcode	spouse_dl_expiration_date
office_office_fax	spouse_office_country	spouse_comments
office_title	spouse_office_phone	spouse_ssn
office_division	spouse_mobile_phone	spouse_nickname
spouse_first_name	spouse_office_fax	spouse_interests1
	family_ssn	spouse_interests2
	family_website	spouse_interests3
	contact_group	spouse_interests4
		spouse_interests5

Custom Data Fields and their merge values

To obtain the correct form names you will need to merge the data from the web form into your custom fields:

- Click on the **"Admin"** tab
- In the **"Manage my Account"** section, click on the **"Customize Account"** link
- Click on the **"Custom Fields"** sub-tab

The screenshot shows the BIGContacts Admin interface. The left sidebar has a navigation menu with 'Admin' highlighted. The main content area is divided into several sections:

- Manage My Account** (highlighted): Includes 'Billing Information', 'Customize Account' (highlighted), and 'Import Contacts'.
- Manage Users**: Includes 'Add / Edit Users', 'Manage User Roles', and 'Manage Teams'.
- Manage Modules**: Includes 'Task Module', 'Sales Module', and 'Marketing Module'.
- Manage Templates**: Includes 'Email Templates', 'Letter Templates', and 'Webforms'.

Below these, there are tabs for 'Regional Settings', 'Calendar Settings', 'Contact Types', 'Contact Activities', 'Custom Fields' (highlighted), and 'Requirements'. The 'Custom Fields' section contains:

- Custom Fields**: A table with columns 'Custom Field', 'Form name', and 'Actions'. It lists 'blood type' (form name: custom_blood_type) and 'adn' (form name: custom_adn).
- Tags**: A section with an 'Add Tag' button and a table with columns 'Name' and 'Actions'. It lists 'Black'.
- Contact Groups**: A section with a description and a table with columns 'Group Name', 'Form Name', 'Actions', and 'Group Values'. It lists 'Eye color' (form name: group_eye_color) and 'Age' (form name: group_age).

Section IV: Support Resources

Dependable Support isn't just what we deliver... It's really what makes us BigContacts. It's our drive to do more than our industry peers. It's our need to make a difference every day to you and every customer.

What you can expect from BigContacts Support

We deliver a full suite of support services at **NO additional cost** to our paid subscribers.

Knowledgebase Library – our library is available to you **24** hours a day, **7** days a week. You will find that it is complete with all sorts of helpful articles, videos and downloads.

<https://bigcontacts.zendesk.com/forums>

Email Support - If you can't find what you are looking for in our extensive library or have any sort of issue with your account, just send us an email...**24** hours a day, **7** days a week. One of our trained advisers will review your request and get back to you as soon as possible.

https://bigcontacts.zendesk.com/anonymous_requests/new

Live Chat - We have highly trained employees that are empowered to help you in any way that they can. Our advisers know how to identify problems and offer solutions. They can even provide advice to you about your BigContacts account based on our industry and technology expertise.

Live chat is available Monday through Friday (8am – 5pm ET)

https://secure.livechatinc.com/licence/1089750/open_chat.cgi?groups=0
